How to Activate a Company / Carrier for Downloads

Before a company can be activated for download into Partner XE, follow these steps.

1. Check that the company is certified to download with Partner XE.
   a. This list is found on the SIS PartnerNet Resource page at www.partnerxe.net/resources/ - Partner XE Carrier Certification List. If the carrier is not on the list, notify SIS Service, service@sisware.com.
2. Obtain your contract number or agency code from the carrier.
3. If any of your companies use IVANS, an IVANS Y account and User ID are needed.
   a. To request an IVANS account, contact your largest carrier that uses IVANS to request sponsorship.
4. If your agency represents **Progressive**, contact them to have their internet download software installed.
   a. Progressive software will need to be installed on the workstation that will have the Automatic Download process setup (Download Transfer Utility)
   b. Contact service@sisware.com to set up folder to receive downloads.
5. If your company uses **Team Up/Connective** instead of using Ivan's, they will need to install the software on the Automatic Download PC.
   a. Note: SIS will supply you with the path per company for the Team Up Software at the time of the Partner XE install or you can request this by emailing service@sisware.com.
6. Designate a PC that will handle the **Automatic Download process for Partner XE**
   a. If this workstation is Shutdown, Restarted, or Logged Off during the Automatic Download process, downloads will not automatically process
   b. Should be setup on a desktop computer, and not a laptop
7. IF you are switching to Partner XE from another agency management system:
   a. Notify ALL your companies/carriers that you will be switching to Partner XE as your agency management system and the date of the switch.
   b. If you are currently receiving downloads through your agency management system, contact your vendor to turn off downloads close to the install date of Partner XE.
8. When these steps are completed, you are ready to enter the company/carrier information into SIS administration. See instructions on PartnerNet www.partnerxe.net/FAQs/ - How do I Add a Company and Writing Company.

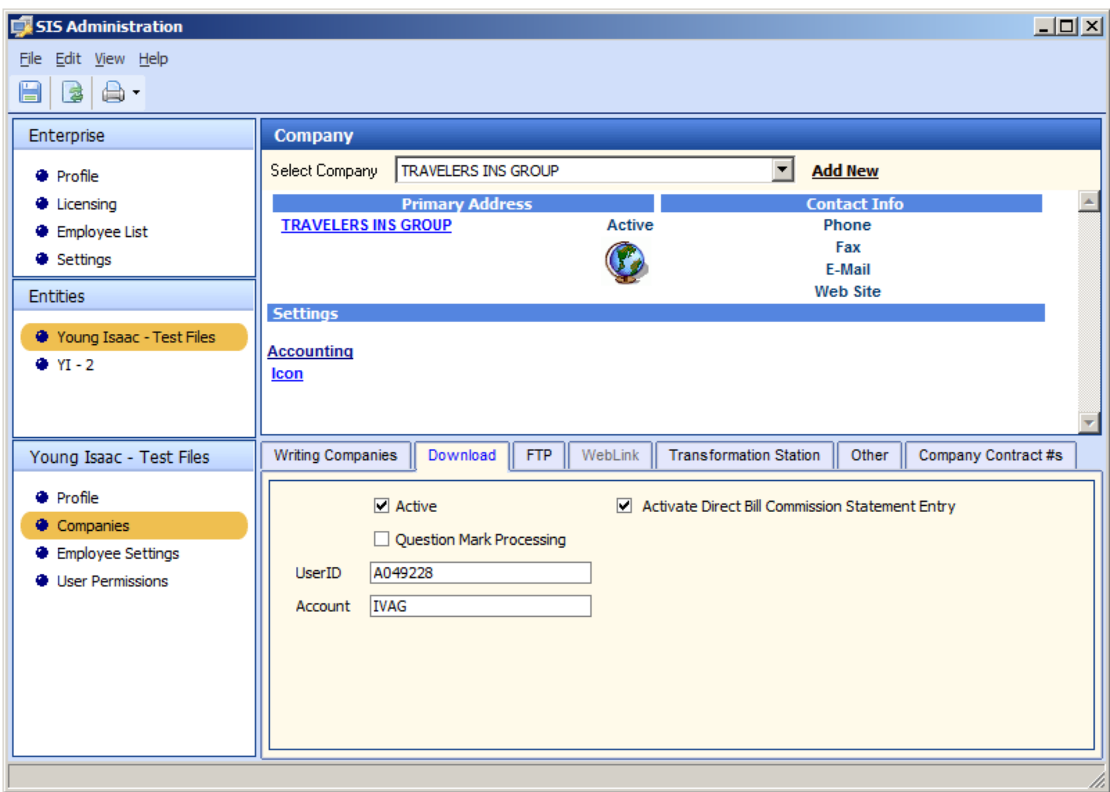
NOTE: The Download, WebLink and Transformation Station tabs will be grayed out / disabled for companies that are not certified with SIS. Only after a company has been through the Certification Process with SIS will the company be considered system defined. After Certification has transpired, the tabs will become active.

How to set up a Company for download in SIS Administration

This function is performed in Partner XE Administration.

From your desktop: Click Start button>All Programs>Partner XE>Partner XE Administration.
NOTE: Must have permissions to be an Administrator.

1. Click on Companies and select the Company in the Select Company pulldown list.
2. Click on the Download tab.



3. Click on the "Active" checkbox.
   IMPORTANT: If not checked, entries are retained but the software will not allow the agency to receive download files for the selected Company.
4. Click on the "Activate Direct Bill Commission Statement Entry" checkbox if the user seeks to activate direct bill commission statement entry.
5. Click on the "Question Mark Processing" checkbox if the user seeks to activate question mark processing.
6. Partner XE will flood the UserID and Account field data from an SIS system database.

How to Set up the Company Contracts Tab

1. Click on the Company Contract #s tab. Click on the Add button to create a new row in the Company Contract's grid form for entering of the Contract number for that Company.
2. Click on the "Save" icon.

How to Set up WebLink for a Company/ Carrier

1. When a Company is added to Partner XE Administration, check if the Weblink tab is activated (not grayed out)
2. Click on WebLink tab.
3. To refresh the websites, uncheck the "Enable Weblink" checkbox.
4. Click Save.
5. Click on (check) the "Enable WebLink" checkbox.
6. Click Save.
7. To use Weblink, click on the 2^{nd} icon next to a policy in a policy list. It will appear as a company logo or a globe.

NOTE: Input of WebLink data will be controlled by SIS. When the **Enable Weblink** checkbox is checked, the software will flood the company's WebLink data from an SIS system database to the Weblink URL and Weblink Functions fields.

partnernet

Partner XE by SIS